



## Digital Commons @ Assumption University

---

Management, Marketing, and Organizational  
Communication Department Faculty Works

Management, Marketing, and Organizational  
Communication Department

---

2019

### Case Exercises in an Introduction to Management Course: A Structured Approach to Increase Student Engagement

Michael S. Lewis

Assumption College, [milewis@assumption.edu](mailto:milewis@assumption.edu)

Robin Ayers Frkal

Assumption College, [ra.frkal@assumption.edu](mailto:ra.frkal@assumption.edu)

Follow this and additional works at: <https://digitalcommons.assumption.edu/business-faculty>



Part of the [Educational Methods Commons](#), and the [Higher Education Commons](#)

---

#### Recommended Citation

Lewis, M. S.; and Frkal, R. A. (2019). Case Exercises in an Introduction to Management Course: A Structured Approach to Increase Student Engagement. *The CASE Journal* 15(1): 46-59. <https://doi.org/10.1108/TCJ-07-2018-0083>

This Article is brought to you for free and open access by the Management, Marketing, and Organizational Communication Department at Digital Commons @ Assumption University. It has been accepted for inclusion in Management, Marketing, and Organizational Communication Department Faculty Works by an authorized administrator of Digital Commons @ Assumption University. For more information, please contact [digitalcommons@assumption.edu](mailto:digitalcommons@assumption.edu).

## Case Exercises in an Introduction to Management Course: A Structured Approach to Increase Student Engagement

### Introduction

Having grown frustrated over the lack of participation and engagement during traditional lecture classes, one author of this paper adopted case exercises as an attempt to improve engagement and participation. This approach had limited success. While expecting robust and interesting discussions that manifested into student learning, what occurred was blank stares and minuscule interaction. What caused this? Was it a lack of student preparation and motivation or the professor's approach? As the two authors of this paper discussed their mutual frustration over lackluster class discussions, they sensed that perhaps the answer was in how they were structuring the case exercise.

This paper discusses a structured process designed to increase the participation and engagement of students using case exercises. It targets an introduction to management class at the undergraduate level, which is often a core requirement in business programs predominately populated with first and second-year students. The literature on student participation supports the process, which suggests that participation is a process rather than an event (Dancer & Kamvounias, 2005).

As one of the most enrolled courses in higher education institutions (Miller, 1991), its primary focus is to provide students with their first impression of what management is and should be (Christopher, Oliver, & Roberts, 2017). As neophytes to the management discipline, these students must develop an appreciation of management as a practice that is informed by theory (Argyris & Schon, 1974; Wright & Gillmore, 2012). The introduction to management course provides that theory. Because of this, the course often results in a lecture-based approach

that explores the landscape of management theory. This type of course often lacks the depth necessary for student engagement in how these theories are used in practice (Bannon, 2014).

While lectures are important in conveying knowledge, it can come at the expense of student engagement (Whetton, 2007). Lectures become even more problematic when teaching today's generation of students, who have little tolerance for passive forms of learning (Waycott, Bennett, Kennedy, Dalgarno, & Gray, 2010). Today's students seek variety and collaboration when learning, and if conducted correctly, class discussions can complement their learning style (Roehling, Kooi, Dykema, Quisenberry, & Vandlen, 2010). Case exercises provide variety and opportunities for collaboration and, therefore, should increase participation. However, there are challenges with adopting case exercises in an undergraduate class that need to be addressed.

First, even when a class focuses on collaboration and discussion, researchers found that students remain silent during class discussions (Roehling et al., 2010). They found that most students rely on the willing few to contribute the most in class (Howard, James III, & Taylor, 2002). This may be caused by an assumption on the part of the faculty that students come to class knowing how to participate. For example, professors typically assign students to read a case exercise and then expect them to come to class and participate in the discussion. When students do not engage and participate, the professor becomes frustrated and wonders what is wrong with the students, rather than what might be wrong with how they are preparing the students to participate.

In addition, case exercises can be more difficult for introductory-level courses where learning focuses on student comprehension of basic concepts. With case exercises, students are traditionally asked to go beyond the comprehension of concepts and are asked to apply knowledge through decision making and critical thinking skills (Andersen & Schiano, 2014;

Bannon, 2014; Nilson, 2010). For case exercises to be effective, students must be comfortable sharing, challenging, and defending ideas. This does not come easily to students still developing these skills (Desiraju & Gopinath, 2001). Finally, undergraduate students often find it difficult to appreciate what they have learned through case discussion (Desiraju & Gopinath, 2001; Whetton & Clark, 1996).

Despite these challenges, there is still an opportunity to use case exercises in introductory courses. However, professors should not use case exercises the same way they might use them in an upper-level course (Bannon, 2014). Professors cannot expect students of an introductory course to lead discussions and construct learning without guidance. A process is needed to structure student engagement while also building and reinforcing core management theories and concepts.

This paper outlines a structured process for case exercises. It begins with a brief review of the student participation and learning styles literature. This paper then moves to a short history of case studies and its use in management classes. While case exercises are not the same as case studies, the literature of case studies did inform the development of this process. From there, this paper describes in detail the case exercise process. Finally, it provides an empirical analysis of this case exercise process and its effect on student participation.

## **Literature Review**

Student participation is one of the great conundrums of academic teaching. While participation can take on many forms, it typically involves discussion (Jones, 2008). However, creating an environment of student participation continues to elude professors. So, why does the professorial community continue its effort to increase participation? Perhaps the answer is because participation often connects with student engagement, which is seen as a way to increase

student achievement (Frymer & Houser, 2016). Fundamentally, student participation is an active and collaborative learning experience with broad-reaching and positive effects on liberal arts learning outcomes (Kilgo, Sheets, & Pascarella, 2015). Also, the traditional lecture format has lost its prevalence in the classroom (Rocca, 2010). The millennial generation, in particular, comes to college with different expectations than previous generations (Roehling et al., 2010). Finally, professors prefer students who participate in class (Frymer & Houser, 2016).

As a way to encourage participation and emphasize its importance, professors usually take the first class to outline student expectations, stressing the importance of class discussion (Sherman & Vega, 2007). In a study of the core curriculum within their university, Bean and Peterson (1998) found that 93% of syllabi included participation as a component of the course grade. To clarify participation expectations and objectify evaluation, professors have moved from an impressionistic method of grading (Bean & Peterson, 1998) to one that involves grading schemes and rubrics (Jones, 2008).

The results have been mixed. This is because the actual discussion is just one part of student engagement (Rocca, 2008). Just expecting students to come to class and participate, and grading them based on how often they speak in class is not enough. Learning is a process that requires reflection, integration of knowledge, and action that solidifies learning (Kolb, 1984). Expecting students to participate without an understanding of the entire process is like expecting a novice bowler to knock pins down without understanding the process of bowling. It may happen occasionally, but it never lasts nor happens consistently.

The variety of student learning styles further complicates participation. Students come into the classroom with preferred ways of learning (Kolb, 1984). Some find it easy to view things from a different perspective and can easily participate in groups. Others are adept at using

theories and concepts to think through complex, abstract problems. Whatever their learning style, students will rely on others when put into a social learning environment, which often leads to going with “gut” instinct versus logical analysis. Every learning style needs to be accommodated and supported versus simply asking students to participate. Case studies are one of the more popular pedagogical approaches used to increase student participation and engagement (Desiraju & Gopinath, 2001). Reed & Brunson (2018) traced the history of the case study all the way back to Socrates and the Socratic Method, which still serves as the legacy for student-centered learning. The first modern-day use of the case method can be traced back to 1870 at the Harvard Law School (Merseeth, 1991). The Harvard Business School adopted the case method in the 1920s (Charan, 1976; Merseeth, 1991). Its then dean, Wallace B. Donham, a graduate of the Harvard Law School, saw the case study method as a way to emphasize problem-solving through the use of real situations (Donham, 1922; Merseeth, 1991). Donham recognized that the businessman’s primary task was to make and implement decisions (Garvin, 2003), and case studies were designed to do that (McDonald, 2017). Early uses of the case study at the Harvard Business School had outside executives facilitate classes that introduced a problem and then had students analyze and discuss solutions (McDonald, 2017).

There have been criticisms of the use of case studies in a business curriculum. First, case studies are backward-looking (McDonald, 2017). Case studies also weaken the link between research and the classroom, risking new research and discovery from ever reaching students (Shugan, 2006). Case studies in business have a positive bias and privilege the idea of a singular leader or leadership team as the hero in turnaround situations (McDonald, 2017). The case method may also, inadvertently, prevent students from double-loop learning through a singular

focus on problem-solving with little, if any, attention on underlying assumptions and beliefs (Argyris, 1980).

Criticisms aside, many disciplines now use the case method. Case studies enliven the class by taking theory and putting it into practice (Sherman & Vega, 2007). It tells a story that is objective and factual and illustrates an organization, group, or person, or presents a problem that requires a decision (Armandi, Sherman, & Vega, 2004). However, assigning case studies does not automatically ensure class participation and engagement. A framework is needed to help show students how to participate. The following case exercise approach does this.

### **Case Exercise Experimental Model**

The case exercise process includes four integrated elements. These are: (1) case exercise selection, (2) structured written case analysis, (3) focused class discussion, and (4) reflection after case discussion. While each component is not unique, the integration of all four into a structured process offers a new approach to teaching the introduction to management course.

Figure 1 provides a visual representation of this process, followed by a description of each element.

INSERT FIGURE ONE HERE

#### *Case Exercise Selection*

Case exercise selection includes three criterion: (1) length, (2) type, and (3) explicit connection to course content. Case exercise should be short. Research suggests that undergraduate students are not willing to invest hours reading to prepare for class discussion (Desiraju & Gopinath, 2001). Short case exercises also allow students to identify and focus on specific management concepts without getting lost or confused in a lengthy narrative. Case exercises that “put students in the shoes” of a manager work best. These types of case exercises

require students to apply specific management concepts in their analysis and decision-making process. Case exercises should also have a connection to the specific course content covered in class. Making connections to the course content allows students to practice and demonstrate knowledge of management theory.

Case exercises found in introductory management textbooks work well. They tend to be short, decision-based, and align with the course topics covered in class. These can be usually found at the end of each chapter and may be labeled as end of chapter case study. Professors can also use newspaper and periodical articles. Faculty can also write their own short cases.

### *Written Assignment*

To help students prepare for class discussion and to demonstrate their knowledge of the material, the process requires students to submit a written analysis. These papers are structured to include: (a) problem definition, (b) explanation and analysis of the problem using management theory, and (c) proposed solution. When using management theory to explain and analyze the problem, students must first explicitly identify and define their chosen management theory. Requiring this leads to a deeper understanding of course content.

Students should submit their written assignment one day before the scheduled case exercise class. Submitting before the class allows the professor to briefly review the submissions and use what is read to help facilitate discussion. The professor can ask for clarification and expansion on what they read and even establish class debates.

### *Class Discussion*

The case exercise follows a structured process for classroom discussion, beginning with the problem definition. Defining problems is a critical skill for management (Wedell-



Wedellsborg, 2017). However, students in introductory management classes tend to move directly to solutions with little thought to the problem. The discussion process is designed to reinforce the need to articulate the management problem before determining solutions. Once the class has thoroughly explored the problem, the discussion moves to the management theory that can be used to explain and analyze the problem. The professor should not identify any theory; students should do this. Holding students to this expectation further develops their understanding of course content.

To increase student engagement, the professor should use both small groups and whole class discussion. Early in the semester, students should organize into groups consisting of roughly four students. These groups should stay together throughout the semester, which allows students to develop relationships. Keeping the groups constant throughout the semester allows students to become increasingly more comfortable in sharing their ideas with the group. Small group discussion also allows for a “safe space” for them to test ideas before class discussion. The ability to share their ideas in a smaller forum seems to increase student engagement throughout the entire class.

Students have a choice in what case exercises they submit for grading, but at least one student in each group to write and submit a case paper before class. This policy gives students autonomy in choosing which case exercises to write and submit but also increases student engagement as every group will have at least one student prepared to lead the group discussion. During the small group discussions, each group is instructed to record their analysis and solutions on the whiteboards. They then present and discuss what they recorded, which helps keep the groups on task. While the students work in small groups, the professor should roam the room and “mine” for ideas that will help facilitate a more robust class discussion.

*Reflection*

The final component is reflection. For reflection purposes, students submit a one-page reflection paper of the case discussion before the next class period. In their reflection, students articulate a big idea they took from the class discussion and describe how the class discussion changed their analysis and proposed solution. The reflection component serves as a reinforcement of students' understanding of management concepts while also motivating them to engage more in the class discussion. It also helps students make sense of what they have learned during the class discussion, something that students at this level may find difficult.

**Outcome of Case Exercise Experimental Model**

This case exercise process was developed specifically to increase student engagement in an introduction to management courses while continuing to ensure that students learn core management concepts. The authors hypothesized that students would participate more in classes using case exercises than in lecture-based classes. A study was conducted in the fall of 2016 to test this hypothesis. The following section outlines the methods of data collection and analysis of the study results.

*Method*

A study was conducted to test the effectiveness of the case exercise process as it relates to increasing student participation. The sample included five sections of an introduction to management course. One author taught three sections, and the other taught two. Each section had between 25 and 30 students consisting mostly of first and second-year undergraduate students.

Because student participation is typically measured subjectively and student engagement is an intrinsically motivated behavior, the study used surveys in which students self-reported their participation. Students filled out a pen and paper questionnaire at the end of 10 classes

during the semester. Five class sessions used the case exercise process, and five followed a more traditional lecture format.

### *Results*

The total number of survey responses was 987 ( $n = 513$  case,  $n = 474$  lecture). The survey asked students whether or not they participated in the class session. If they did, they rated their overall participation using a five-point Likert scale ranging from 5 (high) to 0 (low). An additional open-ended question asked students to briefly describe what they felt contributed to their level of participation.

Students reported participating on 721 of the surveys collected. Sixty percent ( $n=433$ ) of these reports occurred in a class session that followed the case exercise process. Students reported that they did not participate on 255 of the surveys collected. Seventy percent ( $n= 179$ ) of these reports occurred in lecture-based classes. Eleven students did not respond to this question. A chi-squared test of independence was calculated to test these results and found a significant difference ( $X^2(2, n = 712) = 70.15, p < .001$ ) between the study results and expected results based on chance.

### INSERT TABLE ONE HERE

Students also reported a higher level of participation in case exercise classes ( $M = 3.4$ ,  $SD = 1.09$ ) than in lecture-based classes ( $M = 3.06$ ,  $SD = 1.13$ ),  $t(718) = 4.12, p < .001$ . Together these quantitative results support the hypothesis that students participate at higher levels in classes using the case exercise process than in classes that use a lecture format.

The case exercise process also appeared to better prepare students for class. Students reported not preparing for a case exercise class ( $n=513$ ) on only 13 of the surveys collected. Conversely, 125 students reported not preparing for a lecture class ( $n=474$ ).

## INSERT TABLE TWO HERE

The most commonly reported preparation activities were reading and completing the written analysis. Both of these activities improved participation. The average rating for participation after reading the case exercise ( $n=151$ ) was 3.126, SD 1.066. Those that prepared by writing the analysis before class ( $n=256$ ) had an average participation rating of 3.598,  $SD=1.067$ .

## INSERT TABLE THREE HERE

The study also included a thematic analysis of the open-ended survey question to gain a deeper understanding of what contributed to students' reported level of participation. This analysis began by carefully reading and re-reading the comments to identify patterns and themes. Many of the comments did not relate to the research question ("I was tired," "lack of sleep," or "I wasn't feeling well") and others merely reported what the student did regarding participating ("offered opinion," or "I didn't participate"). However, there did appear to be a pattern that related to the elements of the case exercise process.

To further appreciate the themes related to class structure and especially the elements of the case exercise process, the authors coded the comments as either relating to case selection, assignment, discussion format, structure and repetition of the process, or class structure in general. All other comments were coded as other. The applied codes were cross-tabulated with the level of participation reported using the qualitative research software dedoose®. This analysis revealed a theme in the comments provided by students that reported above-average participation (4 or 5 on the Likert Scale). The theme centered around students indicating that the written assignment and the small group discussion contributed to their participation.

Some of the comments suggesting that the written assignment contributed to participation included, “I completed the case study, and I wanted to figure out how I could improve on it.” “Case report made me contribute to class by expressing my thoughts.” “I wrote the case, so I knew the material well.” “I participated a lot because I knew a lot about the topic from writing a report.” Some suggested that the combination of writing the case and having the opportunity to discuss in small groups contributed to their participation. For example, one student stated, “I wrote the case and talked about it in small groups.” Others specifically noted the small group discussion format as contributing to their ability to participate. For example, one student noted that “Discussing with case study group” contributed to their ability to participate in the class. Another student noted, “I like small group discussion.”

These comments reinforce the anecdotal feedback received regarding this process. In course evaluations, students frequently cite cases as one of the most effective teaching methods. For example, one student from a recent introduction to management class noted, “the case studies with the case groups allowed me to interact with other students whilst learning new things.” Another student stated, “Case discussions, in particular, were enjoyable, and breaking us into case study groups was very effective and helped with conversation and realizing the bigger picture.” In a recent class discussion, an additional student noted that the case studies helped her to understand course concepts better. She added that the problem-solving focus and approach made discussions enjoyable. In reflecting on the case exercises, another student remarked that the approach went beyond just learning course content to learning how to frame problems and look at situations from diverse perspectives. This student commented that the problem definition portion of the case study was particularly powerful. She highlighted how each time she came to class with what she believed was a clear and definitive description of the problem, she was

“blown away” by the problem definition discussion and diverse perspectives to the problem offered by students and other ways she could have framed the problem.

## **Conclusion**

Eliciting participation from students in an introduction to management course can be frustrating. Case exercises have the promise to help with this challenge. However, to expect undergraduate students at the introductory level to have the skills and competence in the art of participation is unrealistic. If faculty want students to participate in case discussion, they need to provide them with a structured process to learn and consistently practice the preparation, communication, and group skills required. Moreover, to ensure students appreciate and master the underlying management concepts used to solve the case problems, they need to include a specific focus on theory and reflection.

This article presents a structured case exercise process developed from these realizations. The framework begins with careful case selection, ensuring that cases are both accessible and relatable both to course content and students' interests. It gives students a structured written assignment that helps them actively prepare for class discussion and supports the development of communication and group skills through a consistent case discussion format. Finally, it engages students in reflection to bring home the learning that has occurred in the case discussion process.

We have empirically demonstrated that this case exercise framework increased student participation over a purely lecture-based approach. Students reported participating more and at a higher level in case exercise classes than in lecture-based classes. Student comments suggest that the case assignment and group processes contribute to their ability to participate and student evaluations of courses using this framework are excellent. We are also happy to report that we are no longer routinely frustrated when we walk back to our office after class.

**Limitations and Suggestions for Further Research**

As a whole, these results support that using this case exercise process may result in increased student participation over a lecture based class. However, a further study comparing the case exercise approach with other pedagogical approaches is needed. The study further suggests that the most impactful components of the case process are the written assignment and small group discussion process. However, the survey did not ask specifically about students' perceptions of the individual case elements. A question of this type would provide more insight into the specific utility of each of the elements in the case approach. Finally, further study is needed to determine if this process supports student's learning of management concepts. An additional study that compares both students' reported participation with assessment outcomes in a course that uses the case exercise process with a course that does would be useful in this regard.

## References

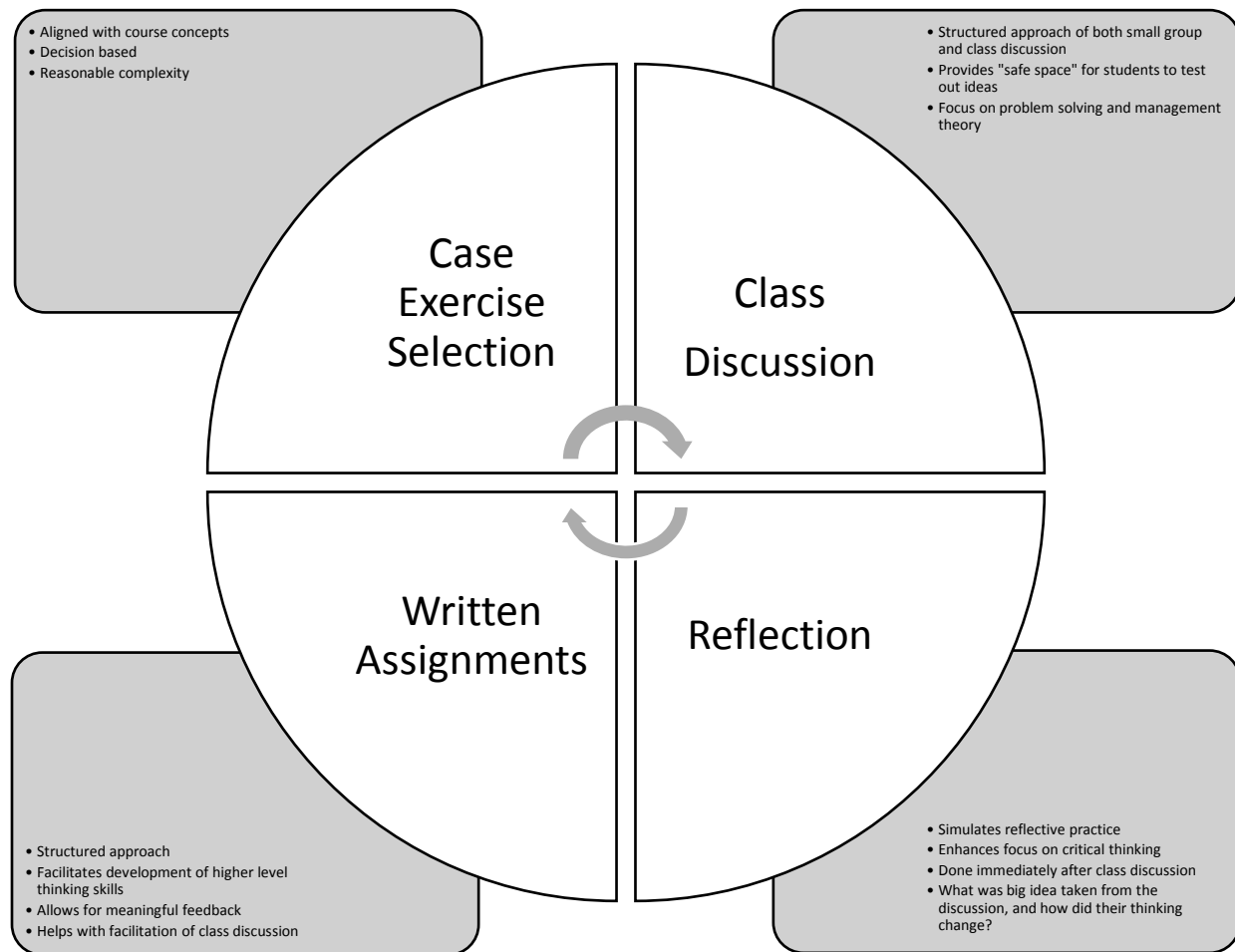
- Andersen, E., & Schiano, B. (2014). *Teaching with cases: A practical guide*. Boston: Harvard Business School Publishing.
- Argyris, C. (1980). Some limitations of the case method: Experiences in a management development program. *Academy of Management Review*, 5(2), 291-298.
- Argyris, C., & Schon, D., A. (1974). *Theory in Practice: Increasing Professional Effectiveness*. San Francisco: Jossey-Bass.
- Armandi, B. R., Sherman, H., & Vega, G. (2004). Case research and writing: Three days in the life of Professor Moore. *The CASE Journal*, 1(1), 8-30.
- Bannon, S. (2014). Case studies in introductory courses. *Journal of Business Case Studies*, 10(3), 293-301.
- Bean, J. C., & Peterson, D. (1998). Grading classroom participation. *New Directions for Teaching and Learning*, 74, 33-40.
- Charan, R. (1976). Classroom techniques in teaching by the case method. *Academy of Management Review*, 1(3), 116-123.
- Christopher, E., Oliver, L., & Roberts, J. (2017). Pedagogical innovation and paradigm shift in the introduction to management curriculum. *Journal of Management Education*, 41(6), 787-793.
- Desiraju, R., & Gopinath, C. (2001). Encouraging participation in case discussion: A comparison of the MICA and the Harvard case method. *Journal of Management Education*, 25(4), 394-408.
- Donham, W. B. (1922). Business teaching by the case system. *The American Economic Review*, 12(1), 53-65.
- Frymer, A. B., & Houser, M. L. (2016). The role of oral participation in student engagement. *Communication Education*, 65(1), 83-104.
- Garvin, D. A. (2003). Making the case: Professional education in the world of practice. *Harvard Magazine*, 106(1).
- Howard, J. R., James III, G. H., & Taylor, D. R. (2002). The consolidation of responsibility in the mixed-age college classroom. *Teaching Sociology*, 214-234.
- Jones, R. C. (2008). The "why" of class participation: A questions worth asking. *College Teaching*, 56(1), 59-63.



- Kilgo, C. A., Sheets, J. K. E., & Pascarella, E. T. (2015). The link between high-impact practices and student learning: Som longitudinal evidence. *Higher Education*, 69(4), 509-525.
- Kolb, D. (1984). *Experiential learning and the science of learning and development*. Englewood Cliffs, NJ: Prentice Hall.
- McDonald, D. (2017). *The golden passport: Harvard Business School, the limits of capitalism and the moral failure of the MBA elite*. New York: Harper Business.
- Merseth, K. K. (1991). The early history of case-based instruction: Insights for teacher education today. *Journal of Teacher Education*, 42(4), 243-249.
- Miller, J. A. (1991). Experiencing management: A comprehensive, "hands-on" model for the introductory undergraduate management course. *Journal of Management Education*, 15(2), 151-169.
- Nilson, L. (2010). *Teaching at its best* (3rd ed.). San Francisco: Jossey-Bass.
- Reed, R. M., & Brunson, R. R. (2018). Exploration of the efficacy of the case method of teaching *The CASE Journal*, 14(3), 362-371.
- Rocca, K. A. (2008). Participation in the college classroom: The impact of professor immediacy and verbal aggression. *The Journal of Classroom Interaction*, 22-33.
- Rocca, K. A. (2010). Student Participation in the college classroom: An extended multidisciplinary literature review. *Communication Education*, 59(2), 185-213.
- Roehling, P. V., Kooi, T. L. V., Dykema, S., Quisenberry, B., & Vandlen, C. (2010). Engaging the millennial generation in class discussion. *College Teaching*, 59(1), 1-6.
- Sherman, H., & Vega, G. (2007). Case writing and research: Professor Moore teaches a class with cases *The CASE Journal*, 4(1), 150-180.
- Shugan, S. M. (2006). Save Research--Abandon the case method of teaching. *Marketing Science*, 25(2), 109-115.
- Waycott, J., Bennett, S., Kennedy, G., Dalgarno, B., & Gray, K. (2010). Digital divides? Student and staff perceptions of information and communication technologies. *Computers & Education*, 54(4), 1202-1211.
- Wedell-Wedellsborg, T. (2017). Are you solving the right problems? *Harvard Business Review*, 95(1), 76-83.
- Whetton, D. (2007). Principles of effective course design: What I wish I had known about learning-centered teaching 30 years ago. *Journal of Management Education*, 31(3), 339-357.

Whetton, D., & Clark, S. C. (1996). An integrated model for teaching management skills. *Journal of Management Education*, 20(2), 152-181.

Wright, A. L., & Gillmore, A. (2012). Threshold concepts and conceptions: Student learning in introductory management courses. *Journal of Management Education*, 36(5), 614-635.  
doi:10.1177/1052562911429446



*Figure 1.* Case Exercise process of introductory management classes

Table 1

*Reported Student Participation*

| <u>Participation</u> | <u>Case Exercise</u> | <u>Lecture</u> | <u>Totals (n=987)</u> |
|----------------------|----------------------|----------------|-----------------------|
| No                   | 76                   | 179            | 255                   |
| Yes                  | 433                  | 288            | 721                   |
| No Response          | 4                    | 7              | 11                    |

Table 2

*Reported Student Preparation*

| <u>Prepared</u> | <u>Case Exercise</u> | <u>Lecture</u> | <u>Totals (n=987)</u> |
|-----------------|----------------------|----------------|-----------------------|
| No              | 13                   | 125            | 138                   |
| Yes             | 499                  | 329            | 828                   |
| No Response     | 1                    | 20             | 21                    |

Table 3

*Participation Levels by Preparation Activities*

| <u>Activity</u>    | <u>Mean Participation Level</u> | <u>Standard Deviation</u> |
|--------------------|---------------------------------|---------------------------|
| Wrote Analysis     | 3.598                           | 1.066                     |
| Read Case Exercise | 3.126                           | 1.067                     |

## Appendix A

### Student Assignment Sheet

#### **The Assignment**

Each case exercise consists of a management situation for you to analyze and offer resolutions. You will frame and define the problem, identify management theory or theories that can explain and analyze the situation, and use your chosen management theory or theories to offer and defend a resolution.

While these case exercises will be used as part of class discussion, you will be responsible for writing and submitting a select number of case exercise papers. Everyone will write and submit the first case exercise and then choose three more throughout the semester. Your case exercise group is responsible for ensuring that at least one group member prepares a written paper for each case exercise. The due dates for the case exercises are in your course schedule. During our case exercise class, we will engage in a discussion of the situation presented. We will first discuss in small groups and then open up to class discussion.

#### **Why Case Exercises?**

These case exercises provide realistic situations that allow you to think about and apply management theory. The exercises, like the real world, do not have one “right solution.” The challenge is for you to analyze the situation presented, identify management theory that can help you explain and analyze the situation, and make recommendations that can be supported by management theory.

#### **Format**

Each written case exercise should be no more than two pages (see policy for written work). It must be submitted to our online Learning Management System the night before class.

See the course schedule for specific due dates and times. Late submissions will not be accepted (see policy for late work).

Each written case exercise must include three sections. Each section must be identified with a heading that is in bold and underlined and separated from the other sections. The three sections are:

**Problem Definition.** You will provide a summary, in your own words, of the situation. You will then concisely frame and define the problem. You will end this section by transforming your identified problem into a written question that must be answered through your analysis and solution.

**Explanation and Analysis of the Problem and Situation.** In this section, you will identify a management theory or theories that can explain this problem and situation. You will clearly describe each theory identified and explain how it fits in this situation.

**Solution and Defense.** In this section, you will propose a solution and defend it using the management theory or theories you identified and the previous section. Provide a detailed recommendation and support it using management theory. Be sure that you are satisfied that your solution answers the question you presented in your problem definition section.

### **The Process**

The class will be divided into small groups. These groups will stay together for the entire semester when working on case exercises. On the day of our case exercise, you will move into your group for the entire class. The discussion will include two components: (1) small group discussion within your group followed by (2) class discussion. Depending on the discussion, you may move back into your small group for additional discussion throughout the larger class discussion.

**Reflection Paper**

You will complete a 1-page reflection paper after each case exercise. See your course schedule for specific due-dates. The reflection paper is designed for you to figuratively step back and think about your analysis and what you learned from the class discussion.

Each reflection paper should be 1-page (see policy for written work). It must be submitted to our Learning Management System by the end of the day of our case exercise. You should keep the following thought questions in mind as you write your paper:

- a. What was your major takeaway or big idea from the case discussion?
- b. How did your initial thinking change after hearing other perspectives?
- c. How would you go about your analysis after the discussion?

## Appendix B

### Example of Case Exercise Process

#### Purpose and overview

The purpose of this exercise is for students to develop their problem-solving skills as well as their understanding of course concepts. The case exercise process should be used multiple times during the semester to accomplish this objective. It is particularly important that professors align this case exercise with specific concepts or theories covered in class. This document provides a sample discussion plan that can be used as a template for implementing case exercises in an introductory management class.

#### Sample Class Plan

The following is a sample class plan for a case exercise using Jones and George (2017) *Essentials of Contemporary Management textbook*. Please note that the following is a sample of a management situation. Its sole purpose is to provide an example of this suggested discussion plan. This situation was not developed by the authors of this article and is not meant to be duplicated for class use.

You have been called in to help managers at a fast-growing internet software company. Your job is to help managers solve some problems that have arisen because of rapid growth. Customer demand has boomed in two years that more than 50 new software programmers have been hired. The growth has been so swift that the company still operates informally, its organizational structure is loose and flexible, and programmers are encouraged to find solutions to problems as they go along. Although this structure has worked well in the past, problems are arising.

There have been increasing complaints from employees that good performance is not being recognized. Employees do not feel they are being treated fairly and that managers are listening to their ideas. A bad atmosphere is developing, and several talented employees have left the company. Your job is to help this company solve these problems.



**Suggested Discussion Plan (75-minute class)**

***Classroom Preparation:*** Organize students into small groups for the case exercise. Begin the class by having students situate themselves into these groups. When using this case exercise multiple times during the semester, students will typically do this without being instructed.

***General Discussion Structure:*** The case exercise includes three separate but related phases. These include (1) problem definition, (2) identification of management concepts or theories being used to explain and analyze the identified problem, and (3) problem resolution. Each phase begins with a small group discussion followed by class discussion. As a way to facilitate the class discussion, the professor can have each small group record the results or conclusions of their discussion on the class whiteboard. It is important to note that this process requires at least one student in each group to submit a formal written analysis before class. The written analysis provides a starting point for discussion.

***Discussion Question 1 – Problem Definition (20 minutes):*** After a short introduction to the situation, the professor asks the students to discuss and define the problem within their small groups. Once each group settles on the problem, a representative of that group writes their short problem definition on the whiteboard. Once all groups have written their respective problem definitions, the professor begins the entire class discussion.

A good way to begin the class discussion is to assess the problem definitions written on the whiteboard. The professor can pick one or more of the problem definitions as a way to initiate a broader discussion and provide feedback. Many times, the professor will want to ask a group for clarification of its problem definition. Asking these types of questions can lead to a deeper class discussion. When the professor sees many variations of the problem provided by groups, this provides an opportunity to challenge groups to see the problem from another

perspective. Making these comparisons can show that seemingly straightforward situations can be interpreted in different ways, which helps students develop an appreciation for diverse perspectives.

The professor may also notice vague problem definitions or definitions that identify symptoms rather than the core problem. These errors serve as an opportunity to teach students how to identify root problems rather than just symptoms. For example, using the sample situation above, many groups may identify the problem as the managers not recognizing employees or not listening to their employees' ideas. Other groups may identify the problem as talented employees leaving the organization. Since these are symptoms of a larger core problem related to the growth phase of the organizational lifecycle, the professor can provide feedback as a way for students to develop their problem-solving skills.

Once the professor is satisfied with the discussion, the class can then move back into small groups for the second phase of discussion, which is to identify the management concepts and theories that can be used to explain and analyze the problem.

***Discussion Question 2 – Explanation and Analysis (30 minutes):*** This phase includes: (1) the identification of management concepts and theories that can explain the situation, and (2) an analysis of the situation using the identified management concepts or theories. First, have each small group identify one or two management concepts or theories that they believe can explain the situation. The professor will want to capture these management concepts or theories on the board. Once a list is created, the professor should ask group members to define each of their identified management concepts or theories and explain why they chose them. Doing this will create a discussion of particular management concepts or theories that can reinforce learning.

In the above example, groups will probably identify the organizational lifecycle concept, the organizing function, or the controlling function as management concepts that can explain this situation. The organizational lifecycle describes the various stages of (1) start-up or embryo, (2) growth, (3) maturity, and (4) decline. Students can describe each phase and the challenges each phase presents to the organization. Students may also describe the organizing function as creating specific role descriptions and formal coordination and reporting relationships. They may describe the controlling function as identifying specific expectations and standards, developing measurements, and then monitoring those measures. Each of these can be used separately or together to explain how a fast growing organization needs structure and management.

Once this part of the discussion is complete, small groups can begin analyzing their problem. The professor should make sure groups have enough time to analyze but also have time for a class discussion. It is important for students to hear how other groups analyzed the situation. The professor can ask clarifying questions and even challenge students and groups to ensure they are applying the management concepts or theories correctly. Once the professor feels satisfied with the discussion, groups can move into the final phase which is problem resolution.

It is important to note that students may combine multiple management concepts or theories to analyze and solve a problem. What is important is that students can connect solutions back to their analysis. For example, in the above compact case students may analyze that during the growth phase of the organizational lifecycle, establishing controls or structure is extremely important in order to avoid the chaos that can lead to employee dissatisfaction. It may be common that during the start-up or embryo phase, an organization will have a loose and flexible structure with employees doing many different jobs. These strategies may work when the organization is small, but as more employees are hired, the loose and flexible structure can cause

more harm than good. Employees can become confused, and work can seem chaotic. Students may suggest that as a way to manage this growth phase, specific job descriptions should be created as a way to structure the work and coordination of tasks. Students may also suggest that management becomes when dealing with growth and more managers may be necessary.

**Discussion Question 3 – Solution (15 minutes):** At this final phase, groups will discuss and present to the larger class their solutions. The professor may want to have groups record their solution on the whiteboard so the entire class can see and compare various solutions. When discussing solutions, each group should connect back to their identified problem and analysis.

**Wrap-up (10 minutes):** The professor can use the final 10 minutes to summarize the discussion, answer any questions, and remind students of the reflection assignment associated with the case exercise.

## References

Jones, G. R., and George, J. M. (2017). *Essentials of contemporary management*. New York, NY: McGraw-Hill Education